Item's Home Institution: Marking Items Claimed Return

This workflow explains how to mark an item as **Claimed Returned** in Alma when a patron states they have already returned an item, but the system still shows it as on loan.

When to Use this Workflow

- A patron disputes responsibility for an item
- An item is believed to have been returned but is not accounted for
- Staff need to pause billing or escalation while investigating
- The item cannot be immediately located

When an item is marked as **Claimed Returned**:

- The loan remains attached to the patron
- The item status changes to **Claimed Returned**
- Investigation can begin without immediately applying Lost status or replacement fees

Note: This status prevents premature billing and supports fair investigation before determining financial responsibility.

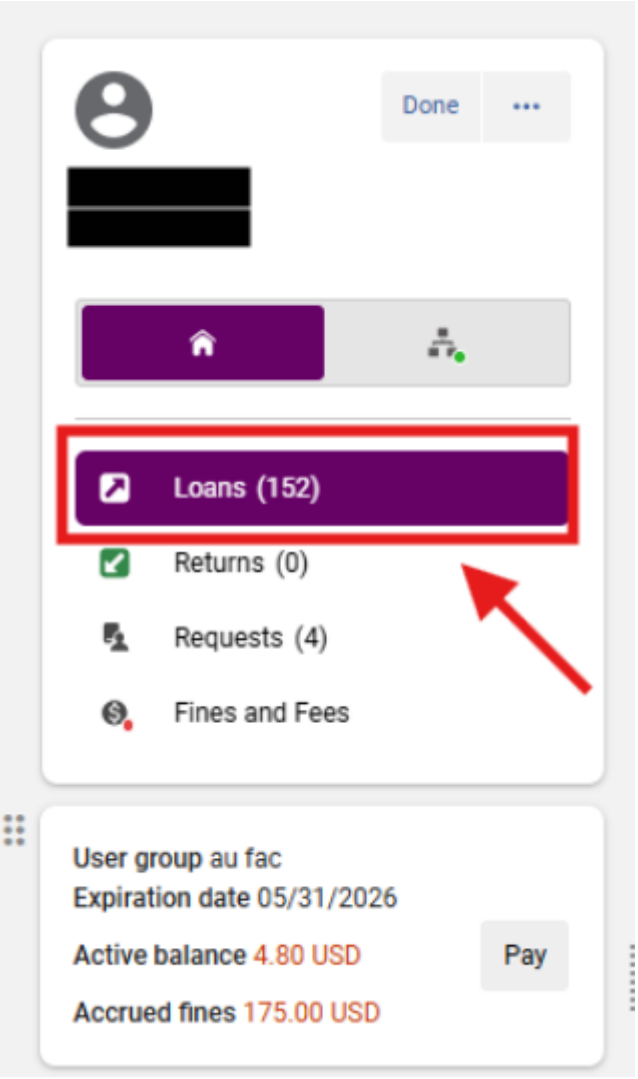
Required Roles

- Fulfillment Operator
- Circulation Desk Manager

1: Locate the Patron Record Navigate to Fulfillment > Checkout/Checkin > Manage Patron Services> Search for and open the patron record

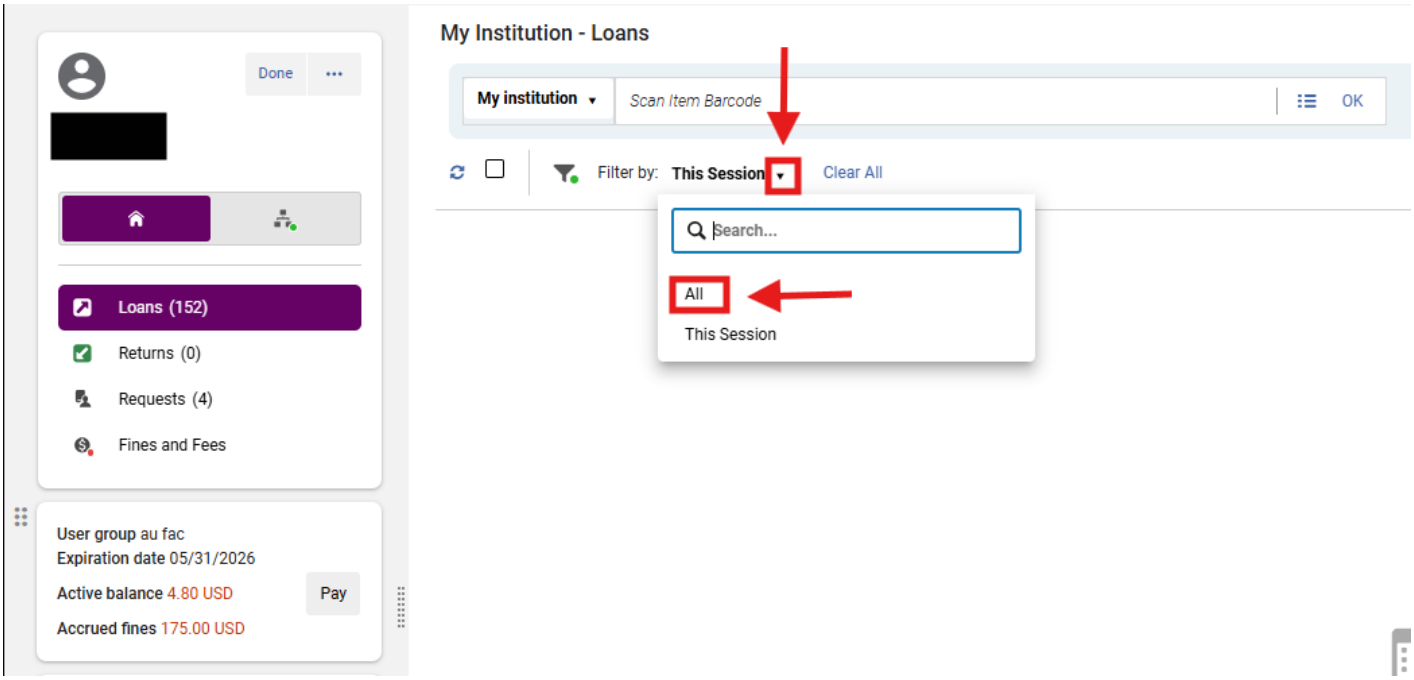
Note: The Lost status must be applied to the active loan itself. This step ensures fees and notifications are correctly tied to the borrowing patron.

2: Open the Loans Tab Select the <Loans> tab

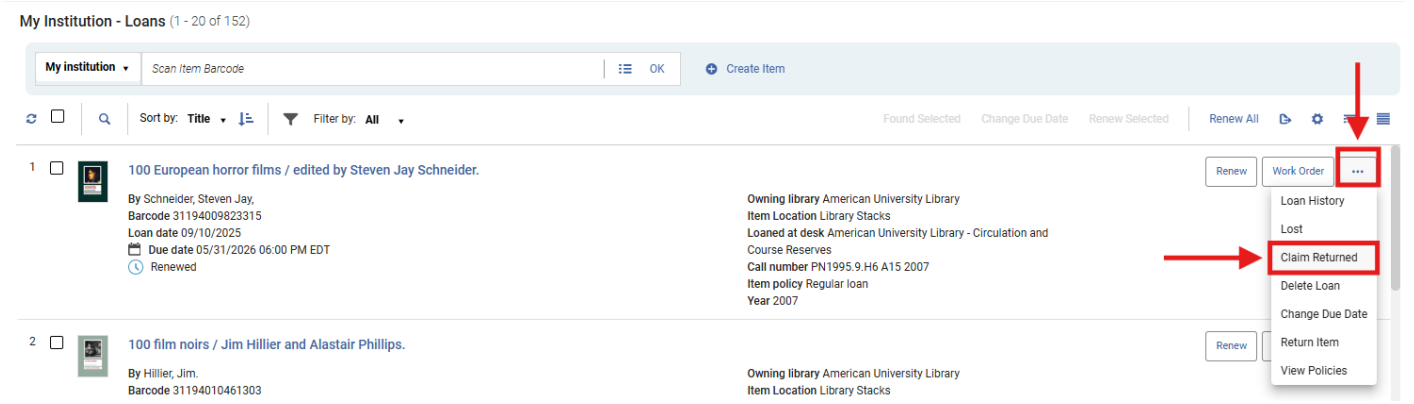


3: Display All Loans In the Loan Display dropdown, select <All>; Locate the item that should be marked Lost

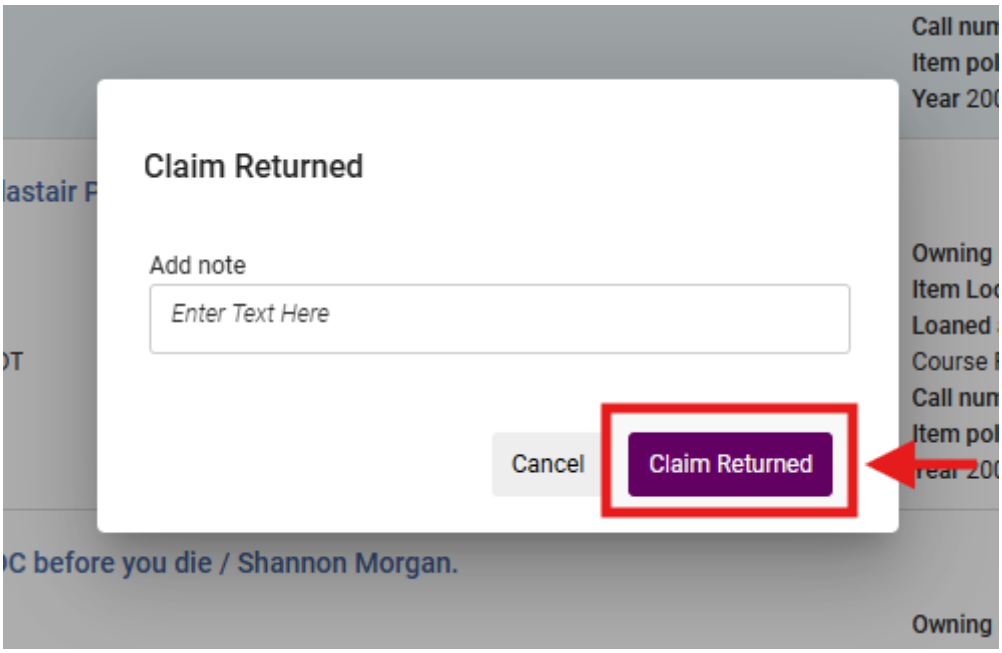
Note: Some items may not appear under <This Session>. Always verify using the full Loan list.



4: Apply Claimed Returned Status Open the row action menu (⋯) for the item; Select <Claimed Return>



- Optionally, enter a note documenting:
  - Patron statement
  - Date of claim
  - Any relevant context
- Select <Claimed Return>



- A dialog box will appear from the right-hand side of the menu stating, "*Loan was successfully declared as claimed returned*"
- The item status will update to Claimed Returned



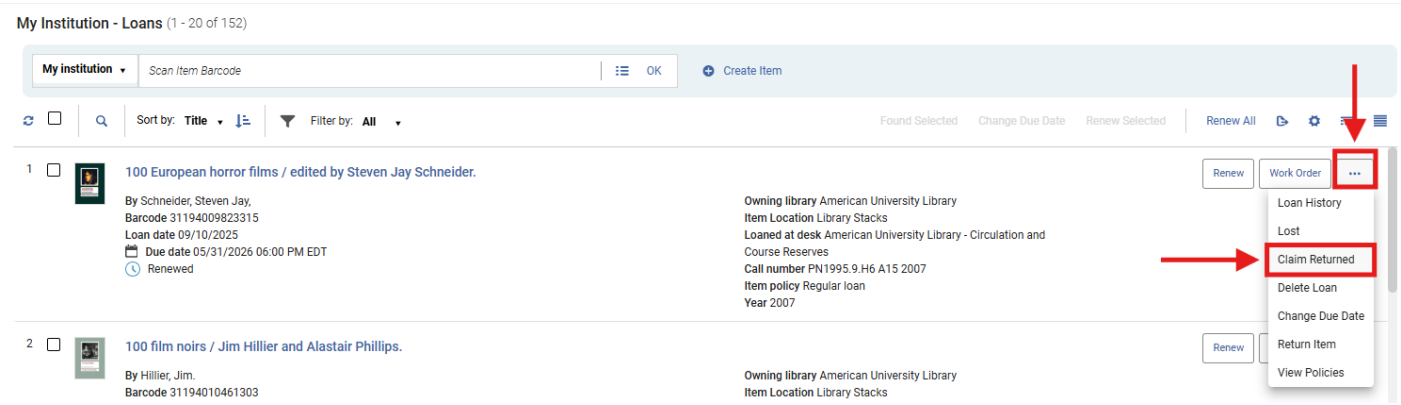
If the Item Is Currently Marked Lost

1: Remove Lost Status First Open the row action menu (⋯); Select <Found Item>

Note: Alma does not allow an item to be both Lost and Claimed Returned. The Lost status must be cleared before applying Claimed Returned.



2: Apply Claimed Returned Status Open the row action menu (⋯) again; Select <Claimed Return>



What Happens After Applying Claimed Returned

- The item remains on the patron’s account
- The loan is flagged for investigation
- Automatic lost billing is typically paused (configuration dependent)
- Staff are expected to perform a physical search per their library's in-house policies

Frequently Asked Questions

- *What is the difference between Claimed Returned and Lost?*
  - Claimed Returned = investigation stage
  - Lost = final determination with billing
- *Does this remove the loan from the patron?*
  - No. The loan remains active until resolved
- *What should I include in the note?*
  - Date of claim, patron explanation, and any relevant staff observations
- *What if the item is later found?*
  - Simply discharge it using <Return Items>
- *What if the item belongs to another consortium library?*
  - Coordinate with CLS or resource sharing workflows; CLS items can only be marked as Lost within its home IZ
- *Can I skip Claimed Returned and mark the item Lost?*
  - Yes, but be sure to review your library's Claimed Return policies

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